

UNITED STATES DISTRICT COURT  
SOUTHERN DISTRICT OF OHIO  
WESTERN DIVISION

_____	:	Case No. _____
	:	
Plaintiff(s),	:	
	:	District Judge _____
vs.	:	Magistrate Judge _____
	:	
	:	
_____	:	RULE 26(f) REPORT OF PARTIES
	:	(to be filed not later than seven
	:	days prior to the preliminary pretrial
Defendant(s).	:	conference)

1. Pursuant to Fed. R. Civ. P. 26(f), a meeting was held on \_\_\_\_\_,  
and was attended by:

\_\_\_\_\_, counsel for plaintiff(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for plaintiff(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for plaintiff(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_,

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_,

2. The parties:

- \_\_\_\_\_ have provided the pre-discovery disclosures required by Fed. R. Civ. P. 26(a)(1), including a medical package (if applicable).
- \_\_\_\_\_ will exchange such disclosures by \_\_\_\_\_.
- \_\_\_\_\_ are exempt from disclosure under Fed. R. Civ. P. 26(a)(1)(E).

3. The parties:

- \_\_\_\_\_ unanimously consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. § 636(c).
- \_\_\_\_\_ do not unanimously consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. § 636(c).
- \_\_\_\_\_ unanimously give contingent consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. § 636(c), for trial purposes only, in the event that the assigned District Judge is unavailable on the date set for trial (e.g., because of other trial settings, civil or criminal).

4. Recommended cut-off date for filing of motions directed to the pleadings:

\_\_\_\_\_

5. Recommended cut-off date for filing any motion to amend the pleadings and/or to add additional parties: \_\_\_\_\_

6. Recommended discovery plan:

- a. Describe the subjects on which discovery is to be sought and the nature, extent and scope of discovery that each party needs to: (i) make a settlement evaluation, (ii) prepare for case dispositive motions, and (iii) prepare for trial: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- b. What changes should be made, if any, in the limitations on discovery imposed under the Federal Rules of Civil Procedure or the local rules of this Court, including the limitations to 25 interrogatories/requests for admissions and the limitations of 10 depositions, each lasting no more than one day consisting of seven (7) hours?

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- c. Additional recommended limitations on discovery:

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- d. Recommended date for the disclosure of lay witnesses:

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- e. Describe the areas in which expert testimony is expected and indicate whether each expert had been or will be specifically retained within the meaning of Fed. R. Civ. P. 26(a)(2).

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- f. Recommended date for disclosure and report of Plaintiff(s) expert(s):

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- g. Recommended date for disclosure and report of Defendant(s) expert(s):

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- h. Recommended date for disclosure and report of rebuttal expert(s):

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- i. Discovery of Electronically Stored Information: The parties have discussed disclosure, discovery, and preservation of electronically stored information, including the form or forms in which it should be produced.

\_\_\_\_\_ Yes

\_\_\_\_\_ No

- i. The parties have electronically stored information in the following formats:

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- ii. The case presents the following issues relating to disclosure, discovery or preservation of electronically stored information, including the form or forms in which it should be produced:

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- j. Claims of Privilege or Protection. The parties have discussed issues regarding the protection of information by privilege or the work-product doctrine, including whether the parties agree to a procedure to assert these claims after production or have any other agreements under Fed. R. Evid. 502.

\_\_\_\_\_ Yes

\_\_\_\_\_ No

- i. The case presents the following issues relating to claims of privilege or of protection as trial preparation materials:

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- ii. Have the parties agreed on a procedure to assert such claims **AFTER** production?

\_\_\_\_\_ No

\_\_\_\_\_ Yes

\_\_\_\_\_ Yes, and the parties ask that the Court include their agreement in an order.

7. Recommended discovery cut-off date: \_\_\_\_\_

8. Recommended dispositive motion date: \_\_\_\_\_

9. Recommended date for status conference (if any): \_\_\_\_\_

10. Suggestions as to type and timing of efforts at Alternative Dispute Resolution:

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11. Recommended date for a final pretrial conference: \_\_\_\_\_

12. Has a settlement demand been made? \_\_\_\_\_ A response? \_\_\_\_\_

Date by which a settlement demand can be made: \_\_\_\_\_

Date by which a response can be made: \_\_\_\_\_

13. Other matters pertinent to the scheduling or management of this litigation:

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Signatures:

Attorney(s) for Plaintiff(s):

\_\_\_\_\_  
Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

Attorney(s) for Defendants(s):

\_\_\_\_\_  
Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Trial Attorney for \_\_\_\_\_

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Trial Attorney for \_\_\_\_\_

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Ohio Bar # \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_